

TEACHERS' RETIREMENT BOARD  
BENEFITS AND SERVICES COMMITTEE

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SUBJECT: FY 2000-01 PRODUCTION OBJECTIVES

ITEM NUMBER: 4

ATTACHMENT: 2

ACTION: X

DATE OF MEETING: June 8, 2000

INFORMATION:     

PRESENTER(S): Michael Carter

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The "Production Objectives" are presented to the Benefits and Services (B&S) Committee on an annual basis and set forth quantitative measures of CalSTRS' ability to provide timely benefits and services to its members. These Production Objectives, also referred to as "Service Levels", are validated by customer surveys from time-to-time to determine the degree to which the members' service expectations are being met.

The Production Objectives primarily measure cycle time or the internal time needed to process benefits and services. A few of the Objectives focus on quantitative standards for providing services (i.e., provide 25,000 counseling interviews for the year).

It is recommended that the Current Year Production Objectives continue into the 2000/01 fiscal year without modification for the following reasons:

1. The year-to-date achievement of the current year (Fiscal Year 1999/00) objectives (Attachment I) is quite satisfactory particularly in light of staff's participation in START, enhanced benefit implementation and other significant developments.
2. Fiscal Year 2000/01 will present many challenges including START conversion, continued enhanced benefits implementation and START enhancements, to name a few.
3. Although the Downtime Period is expected to create backlogs and will challenge staff's ability to meet the objectives, the System believes it to be in the best interest of its members to pursue every possible solution to achieve these service levels.

Accordingly, as indicated, it is recommended that the Benefits and Services Committee continue the Fiscal Year 1999/00 Production Objectives into Fiscal Year 2000/01 without modification (Attachment II).

## 1999-00 CalSTRS PRODUCTION OBJECTIVES

### Year-to-Date Achievement

	Target/ Actual
<b>SERVICE RETIREMENTS</b>	
<i>Process 100 percent of all service retirement application payments within 30 days of the retirement effective date or receipt of completed application, whichever is later.*</i>	100/100
<i>Complete 100 percent of all final service retirement payments within 45 days of receipt of all necessary information.*</i>	100/96
<i>Finalize 90 percent of all service retirement payments within four months of the retirement effective date.</i>	90/92
<b>SURVIVOR BENEFITS</b>	
<i>Process 95 percent of all applications within 30 days of receipt of all necessary information.*</i>	95/97
<i>Complete 95 percent of all death benefit payments for retired members within 90 days of receipt of notification of death.</i>	95/98
<b>DISABILITY SERVICES</b>	
<i>Process 100 percent of all eligible applications within 180 days of receipt.</i>	100/98
<i>Process 95 percent of all approvals within 30 days of receipt of all necessary information.</i>	95/99
<i>Process 100 percent of all initial payments within ten working days following the latter of the disability approval date, disability effective date or receipt of all necessary information.*</i>	100/100
<b>PUBLIC SERVICE</b>	
<i>Answer 95 percent of all calls in less than three minutes.</i>	95/93
<i>Answer 95 percent of all calls on the first contact.</i>	95/97
<i>Respond to 90 percent of all correspondence in ten working days.</i>	90/92
<b>REGIONAL COUNSELING SERVICES</b>	
<i>Conduct 400 workshops.</i>	400/414
<i>Provide 22,000 retirement interviews.</i>	22,000/22,842
<i>Deliver 41 Financial Education Programs to CalSTRS members.</i>	41/26

\* The accomplishment of this objective will minimize interest penalty payments resulting from processing delays.

## **PROPOSED CalSTRS 2000/01 PRODUCTION OBJECTIVES**

### **SERVICE RETIREMENTS**

- T**     *Process 100 percent of all service retirement application payments within 30 days of the retirement effective date or receipt of completed application, whichever is later.\**
- T**     *Complete 100 percent of all final service retirement payments within 45 days of receipt of all necessary information.\**
- T**     *Finalize 90 percent of all service retirement payments within four months of the retirement effective date.*

### **SURVIVOR BENEFITS**

- T**     *Process 95 percent of all applications within 30 days of receipt of all necessary information.\**
- T**     *Complete 95 percent of all death benefit payments for retired members within 90 days of receipt of notification of death.*

### **DISABILITY SERVICES**

- T**     *Process 100 percent of all eligible applications within 180 days of receipt.*
- T**     *Process 95 percent of all approvals within 30 days of receipt of all necessary information.*
- T**     *Process 100 percent of all initial payments within ten working days following the latter of the disability approval date, disability effective date or receipt of all necessary information.\**

### **PUBLIC SERVICE**

- T**     *Answer 95 percent of all calls in less than three minutes.*
- T**     *Answer 95 percent of all calls on the first contact.*
- T**     *Respond to 90 percent of all correspondence in ten working days.*

### **REGIONAL COUNSELING SERVICES**

- T**     *Conduct 400 workshops.*
- T**     *Provide 22,000 retirement interviews.*
- T**     *Deliver 41 mid-career programs to STRS members.*

\* The accomplishment of this objective will minimize interest penalty payments resulting from processing delays.